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ASSOCIATION
INSURANCE
MANAGEMENT INC

INSURANCE TRANSITION FAQ

Q. Why are we changing brokers?

A. The Board of Directors recognized a need to ensure that the organization and all units, councils and districts were receiving superior customer support as well as the best coverage available for the current premium. After conducting a thorough objective analysis, the decision was made to change brokers to Association Insurance Management (AIM). AIM offers 24/7 customer support through a toll-free phone number – with direct access to a customer support representative – as well as an email address.

Q. What is the difference between a broker vs. a carrier?

A. The broker, or agent, services the policy (answers questions about coverage, issues certificates etc.). The carrier is the insurance company that writes the policy and pays the claims.

Q. Will there be any change to coverage or carriers?

A. California State PTA is on an annual renewal for all coverage and carriers. Current coverage is in effect through January 4, 2019. PTA leaders will be notified if there are changes to coverage and/or carriers for the January 5, 2019 – January 4, 2020 policy period.

Q. Are there any changes in the premiums for next year?

A. No, the premiums noted in the financial mailing are still in place. Please pay the quoted premium through channels.

Q. Do units need an updated insurance certificate since our current certificate lists another broker?

A. No, your PTA does not need a new certificate of insurance for the current policy period.

Q. Who do I contact for a current certificate or to add an Additional Insured?

A. Please contact AIM at capta@aim-companies.com or at (214) 360-8733

Q. If I filed a claim before October 23, who should I work with to resolve the claim?

A. Please contact AIM at capta@aim-companies.com or at (214) 360-8733 for assistance with resolving any outstanding claims.

Q. How do I report a new claim?

A. Please refer to the claim guidelines in the *Insurance and Loss Prevention Guide* and submit all new claims to AIM at capta@aim-companies.com or at (214) 360-8733.

Q. Can I call AIM with any of my PTA-related insurance questions?

A. Yes! You can contact Jamie Fagan at capta@aim-companies.com or at (214) 360-8733.

Q. Will AIM provide webinars or other trainings?

A. Yes, we are working on possible dates and will reach out soon with additional information.

Q. Do I still follow the current green, yellow and red guidelines?

A. Yes. You can find the current guidelines online at <https://capta.org/pta-leaders/services/insurance/>.